



Working Together  
**In Partnership**

May 2023

# Exceed Academies Trust

Exceed Academies Trust is a charitable organisation which is responsible for running schools on behalf of the Department for Education. Our children, students and young people are at the heart of everything that we do. We believe that successful and inclusive schools develop their own identity and individuality and are best placed to meet their own community's needs. We want to help you deliver a high-quality education for your children, students and young people and we believe that partnership working, the sharing of good practice and being outward facing as an organisation supports this ambition. The Trust operates central services which are supported through a top slice which is annually negotiated, and which typically falls between 4.5 – 5.5% of GAG (General Annual Grant)

We are conscious that a 'one size fits all' model does not always fit best, and our ambition is to keep as much funding in our schools/academies as possible.

In recent years the Trust has been successful in securing a range of grants and commissions from the Department for Education, that benefit not only our schools/academies but schools/academies beyond the Trust and across the wider region. These include:

- Trust Capacity Fund £600,000 (2021-2023)
- Opportunity Area & Priority Area commissions £2,000,000 (2021-2023)
- Bradford SAFE Taskforce £3,377,500
- Bradford AP Taskforce £481,200 (2021-2023) plus an additional £294,512 (September 23 – March 2025)
- Teaching School Hub £170,000 (annually)

The scale of the Trust also enables our eligibility for the School Condition Allocation (SCA) funding. Our 2023-24 annual allocation will be £670,000. This amount is based on current pupil numbers and will increase when additional schools/academies join our Trust.

The Trust will also be applying for the 2023-2024 Trust Capacity Fund (TCAF), which has been realigned to support the Department for Education's ambition to rationalise the Trust sector by encouraging academisation, MAT mergers, and supporting strong Trusts to grow. Trusts can bid for a maximum £750,000 which would support central capacity, the onboarding of new schools/academies, and enhance the range and quality of services available to all.



## School Improvement

Facilitated by the Trust, we support leaders to lead their school/academy by enhancing their capacity for continuous improvement, including through workforce development. The goal is to help every leader, teacher and support staff to be as good as they can be in leading their school/academy: in what they teach (the curriculum); and how they teach (pedagogy). Our essential procedural system and processes help to build capacity; provide a forensic analysis of need; and aid self-evaluation and action for improvement.

### Core Offer - Professional development for all staff

- A programme of professional development for leaders, teachers, and support staff.
- Regular school-led Network Meetings focus on key themes, including networks for Headteachers, DSLs and SEND Coordinators.
- Contextualised Early Career Framework based training for ECTs and Mentors is delivered in partnership with Exceed Teaching School Hub.
- Our Instructional Coaching Programme builds expertise in teacher development.
- Senior leaders can apply for the 'Yorkshire 100' aspiring headteacher programme led by Exceed Academies Trust and partner trusts.
- We provide access to the full suite of National Professional Qualifications for aspiring and current leaders, including support staff for eligible programmes.
- Bespoke CPD programmes are available to our workforce. These are developed and delivered to meet the needs of the Trust and schools/academies.
- Schools/academies benefit from access to ITT Core Content based training for trainee teachers provided by Exceed SCITT.
- We regularly signpost high-quality professional development from trusted providers, including subject and school hubs.
- The Trust has introduced a professional library in each school/academy to help make research easily accessible to leaders, teachers and support staff.
- HR, finance, risk, GDPR and estates-focused training is available from the Central Team, including Safer Recruitment training.
- Termly face-to-face Governor Development Networks.
- Headteachers are involved in an externally-led Peer Challenge Review (PCR) process for their own professional development (see School-to-school support).

### Core Offer - Leadership and management

- The Trust facilitates supported self-evaluation with leaders of each school/academy.
- A common format for the school/academy Self Evaluation Document (SED) and Continuous Improvement Plan (CIP) helps schools/academies and the Trust to identify strengths in provision to share with other schools/academies, and priority areas for development where the trust can provide additional capacity to support improvement.
- The Trust works with each school/academy leadership team to help scope, implement, and evaluate strategies.
- The Trust will help commission and/or broker school-to-school or peer-to-peer support.
- Assembly Pro provides an overview of trust-level summative data to the Central Team and Headteachers.
- Thematic trust and national benchmarking reports inform leadership's school/academy self-evaluation and improvement planning.
- Half termly Leadership Meetings for the Trust's leadership team provide opportunities for schools/academies to collaborate.
- The annual Trust Development Day provides an opportunity for leaders to help guide Trust development for the year ahead.
- Appraisal and mid-year reviews are overseen by the CEO with external independent support for Headteachers and the Central Team.

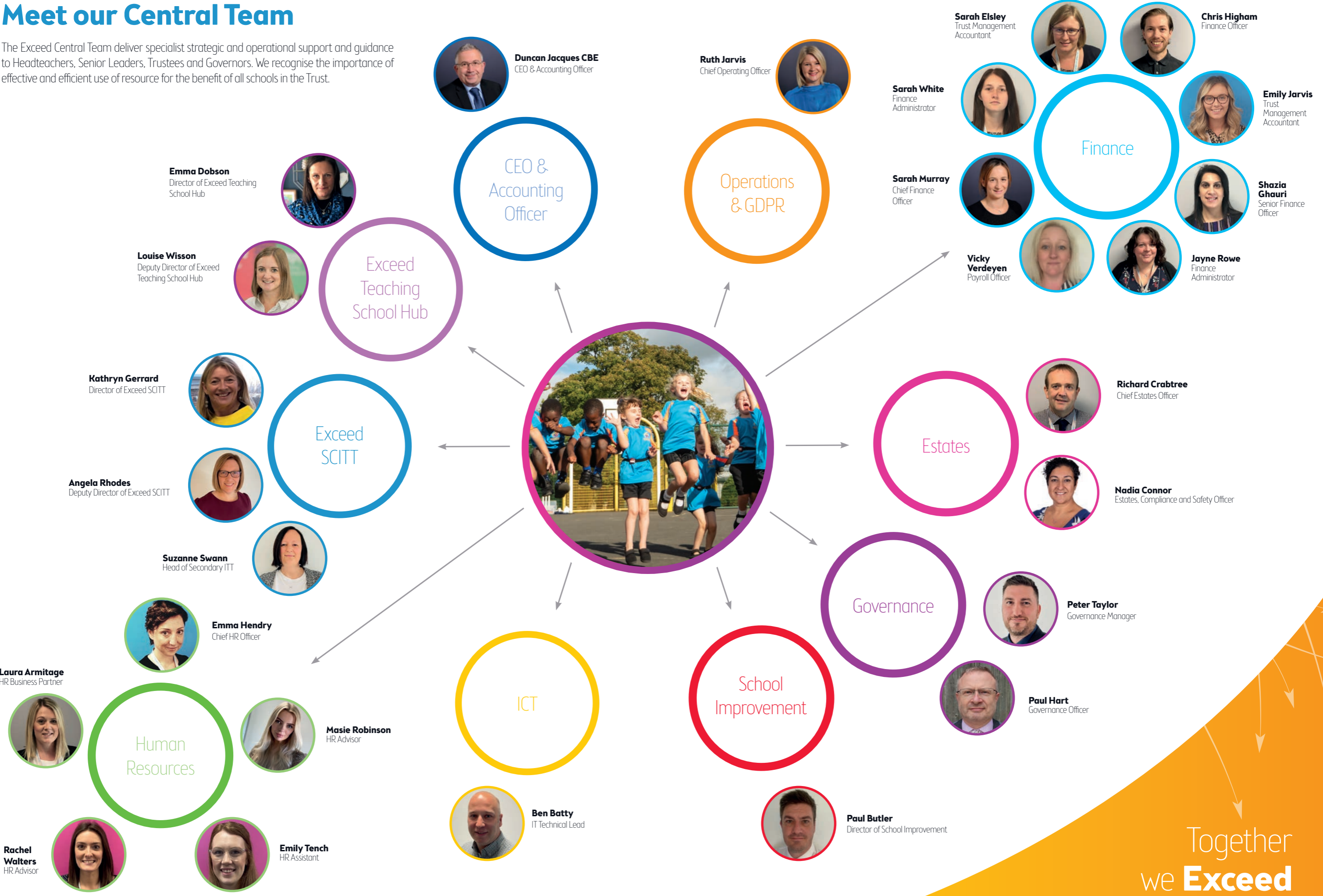
### Core Offer - School-to-school and peer-to-peer support

- Two-days of support from each Exceed Expert Colleague adds school improvement capacity for each school/academy.
- An annual Peer Challenge Review (PCR) for each school/academy is funded by the Trust and led by an external consultant with inspection experience.
- The Trust supports the brokerage of system leader support to help schools/academies to address their priorities.
- The Trust facilitates Peer Learning Conversations (PLC) between the Headteacher and two leaders from other Exceed schools/academies.
- An extensive professional development offer is provided (see Professional development for all staff).

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# Meet our Central Team

The Exceed Central Team deliver specialist strategic and operational support and guidance to Headteachers, Senior Leaders, Trustees and Governors. We recognise the importance of effective and efficient use of resource for the benefit of all schools in the Trust.



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# Human Resources

The Human Resources (HR) team are an integral part of Exceed Academies Trust. Working alongside our school/academy leaders and as part of the Central Team, we deliver an in-house, professional, strategic HR consultancy service to all schools and academies. Our highly skilled HR team offer a comprehensive, educational specialist consultancy service, over the phone, via email, and in person covering all aspects of HR.

## Core Offer

- Development and ongoing review of a suite of HR policies, procedures, terms of employment, job descriptions, person specification and the implementation of Local and National Agreements.
- Casework and HR advisory support with conduct issues, including disciplinary concerns, complaints, and grievance resolution
- HR Audits
- Strategic HR planning & development
- Support with recruitment and selection including leadership appointments alongside recruitment and retention initiatives
- A trust wide absence management system to support short- and long-term absence management
- Promotion of staff welfare, wellbeing, via access to Health Assured and occupational health service
- Strong and active liaison with union representatives and management of industrial action
- Oversight of allegations against staff, including LADO referrals, low level concerns
- Representation at internal and external hearings and appeals
- Support with organisational change including TUPE, staffing restructures and redundancy processes
- Performance management and appraisal, informal support, and capability processes
- Governor, Trustee and Member HR support
- HR Legal support with Trust partner (Stone King)
- Management of apprenticeship levy funding
- Quality assurance and cross checking of monthly payroll data, processing and returns
- Pension scheme management
- Gender pay gap reporting
- Staff surveys

# Finance

Exceed Academies Trust operates a central finance model. Our experienced, skilled and professional central finance team provides comprehensive support to our schools and academies, organisations, and central departments in areas of budgeting, financial reporting, purchasing, and invoicing. They work closely with the responsible staff in our schools and academies to ensure we maximise resources and make as much funding available for educational priorities and pupil experiences. We ensure compliance with financial management and governance requirements.

All schools and academies within the Trust adhere to the latest ESFA Academy Trust Handbook and the Trust publishes annual financial statements and reports which are subject to a robust external audit. Throughout the year our finance team provide detailed monthly management accounts and reporting information to each of our schools and academies, which include budget monitoring, key financial data, and benchmarking analysis to ensure the current and future financial stability of each school/academy and the Trust.

Trustees review our finances within the Finance, Risk & Audit Subcommittee. Our Board of Trustees scrutinise and challenge the longer-term financial strategy by consideration and approval of our 3-year budgets every summer term.

## Core Offer

- Development and implementation of robust and compliant Financial Regulations, Procurement and Expenses Policies and Operational Finance Handbook
- Annual budget setting with schools/academies and on-going monitoring to ensure rigour and scrutiny in budget management
- Regular finance meetings with headteachers throughout the year
- Monthly management accounts and KPI reporting, cash flow forecasts and bank reconciliations
- Central processing of invoices and Bacs payments for the Trust
- Trust wide procurement opportunities
- Sharing of best practice across the Trust, advice on suppliers where required, streamlining contracts for best value
- Appointment of external auditors
- Appointment of internal auditors and design of programme of internal scrutiny
- Submission of grant claims, Annex G audits and liaising with DfE/ESFA on financial matters, including advising on any transactions requiring ESFA advance approval
- Submission of all DfE/ESFA returns including Teachers Pension Audit, Budget Forecast Return and Academy Accounts Return, School Resource Management Self-assessment checklist (SRMSAT)
- Submission of VAT returns and other HMRC returns
- Management of the Trust's bank account
- Planning and oversight support of capital projects
- Headteacher training and support and whole school/academy training on ordering processes and finance regulations
- Governor, Trustee and Member Finance training and support
- Approval of payroll and reconciliation to budgets

# Operations

Our Chief Operating Officer provides trust wide strategic and operational support to our school/academy leaders, Central Team colleagues, Governors, and Trustees. The Trust encourages collaborative working across its schools/academies and Central Team, the sharing of common systems and flexibility for schools/academies to take part in trust wide procurement exercises. Over the last five years we have reviewed and streamlined key central services such as catering, cleaning, and ICT. These exercises were facilitated by our Central Team working alongside a panel of school/academy leaders and Trustees. All decisions made reflect and support the needs of our pupils, students, and young people. The Trust operates an agile model of support and recognises that 'one size does not always fit all' and that bespoke solutions may be required for individual schools and academies.

Exceed Academies Trust has been successful in applying for a variety of grants, including the DfE Trust Capacity Fund (TCaF) which is available to support high quality trusts take on underperforming schools and develop their central functions. In 2021-22 we successfully applied for £288,000 towards the roll out of our ICT Vision & infrastructure, payroll systems and additional central roles to support growth. In 2022-23 we were delighted to be awarded with a further £299,913 which has been invested in the development of our School Improvement Team, 'Exceed Expert Colleagues', CPD, new websites and an online training platform available to all our schools and academies.

## Core Offer

- Strategic risk management, including termly risk register review with individual schools and academies. Our Finance, Risk & Audit Committee are responsible for scrutiny and risk analysis
- Trust wide brand development, marketing and communications including websites
- GDPR & Data Protection (The COO is the Trust's named Data Protection Officer), supporting schools/academies with all aspects of GDPR (SARs, FOI, data requests and DPA Breaches) and regulatory training requirements via our online platform
- A trust wide approach to procurement, with schools/academies having the ability to 'opt in' depending on their individual circumstances, including reprographics, catering, cleaning etc
- Ongoing contract management of procured services
- Trust strategy
- Bi-annual internal scrutiny & audit process
- General legal advice and liaison with the Trust's external legal partner (Stone King)
- Trust and school grant funding applications
- Project management and in-depth knowledge of the academisation process, working alongside the DfE, LA, solicitors, and schools/academies to ensure an efficient and compliant 'on-boarding' process into our Trust

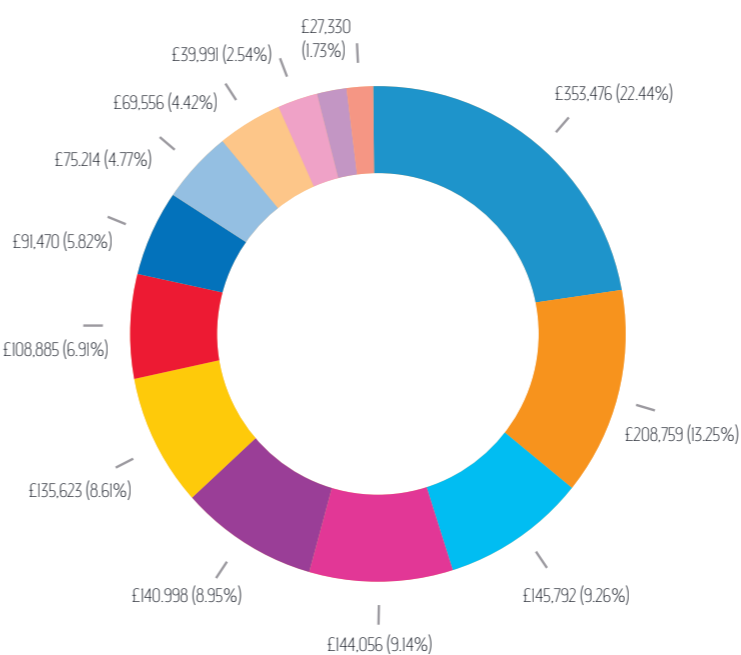


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# School Condition Allocation 2019 - 2022 (SCA)

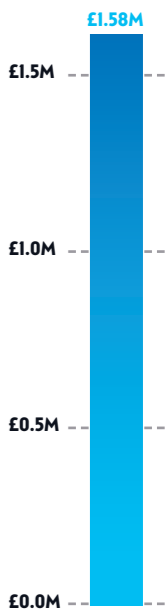
Value by Type of Work



Type of Work

- External Play Areas
- Compliance
- Other
- Heating
- Carbon Reduction
- Classroom Environments
- Redecoration
- Safeguarding / Security
- Roof / Structure
- Car Park / Footpaths
- Gates / Fencing
- Electrical
- CCTV
- Entrance / Reception

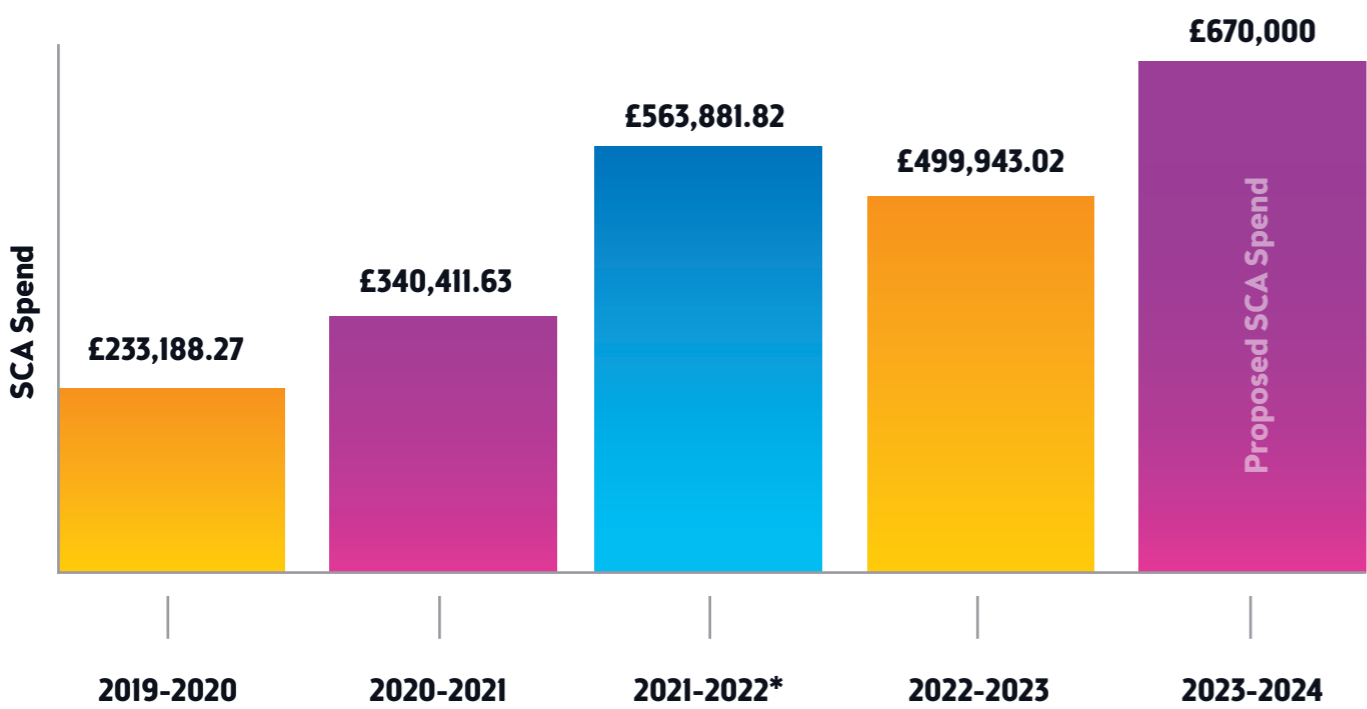
Total Value



## Estates

Our Estates team supports school and academy leaders and site managers, providing strategic oversight and project delivery in the areas of health and safety compliance, contract management, repairs and maintenance, and building improvements. All schools and academies within the Trust have their own site managers who work closely with the Headteacher and other senior leaders on day-to-day security, maintenance, and management of the school/academy site.

The Chief Estates Officer leads on trust wide estate development and maintenance, planning the strategic investment of the Trust's School Condition Allocation funding to develop individual five-year development plans for each setting.



\*Additional funding received post COVID lockdown

### Core Offer

- Site management and maintenance: ensuring that all sites within our Trust are safe, well-maintained, well managed, clean, and functional on a day-to-day basis.
- Health & Safety: conducting thorough audits, risk reviews and supporting all our sites to provide a safe and secure working environment for our children, employees and visitors.
- Property and asset management: supporting our schools and academies to effectively manage their settings, ranging from basic maintenance to leasing and complex land issues.
- Energy management: monitoring energy consumption, implementing energy-efficient practices and exploring sustainable energy solutions to reduce both the environmental impact and operational costs across all our schools and academies.
- Estates statutory compliance: effective management of all settings to ensure compliance with relevant laws, regulations, and standards related to health and safety, building codes, fire safety, environmental protection, and other legal requirements.
- Estate safety and security audits: Our Central Team conducts estate safety and security audits. We assess safety measures, including surveillance systems, access controls, emergency response protocols, and physical security infrastructure, prioritising the safety of our children, employees, visitors, assets, and information.
- Estate planning and development: creating comprehensive plans in conjunction with our school and academy leaders for short, medium, and long-term site development.
- Project management: support our leaders by overseeing site-related projects, ranging from renovations and expansions to equipment installations.

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# ICT

The Trust's ICT team supports all schools and academies to provide a safe, secure and stable ICT environment. This enables our schools and academies to deliver high-quality teaching and learning through digital means. We have high expectations of our ICT infrastructure and whilst this is bespoke to each setting, we support our schools and academies to achieve a trust-wide minimum standard.

## Core Offer

- Centralised service desk & onsite engineers who work with specialist companies to provide state of the art ICT support functions. We provide a traditional onsite role with the benefit of a remote service desk to rapidly resolve any ICT needs across our schools and academies.
- Our Trust prioritises robust and reliable connectivity solutions, ensuring seamless internet access and network connectivity for all schools and academies. This enables smooth communication, collaboration and access to online resources and systems shared Trust wide.
- We manage software and licensing agreements centrally, ensuring compliance and cost-effective solutions across all our schools and academies. A streamlined approach to the procurement and management of software licenses reduces the administrative burden for individual settings.
- Project management.
- Our Trust employs comprehensive security measures to safeguard our schools and academies internet and network infrastructure. We employ firewalls, intrusion detection, security and monitoring software, and undertake regular security audits to protect against cyber threats and unauthorised access.
- Data management and security.



# Governance

Our Governance Professionals work with our Members and Trustees, and across all our schools, academies and organisations to support their local governance arrangements. The Governance Manager and Governance Officer attend all Members, Trustees, and Local Advisory Board meetings and provide advice and guidance on procedural matters, schemes of delegation, membership and policy. They also ensure that the processes and procedures of governance are administered efficiently allowing Members, Trustees and Local Governors to make more effective use of their time by focusing on strategic matters and the delivery of the Trust's charitable objects, vision and values. The Governance Team supports the Trustees in enabling all levels of governance to work in accordance with the Framework for Ethical Leadership in Education and to abide by the Trust's governance code of conduct, which incorporates the Seven Principles of Public Life.

## Core Offer

- High quality, comprehensive advice, support, and information provided by in-house Governance Professionals for our Trustees, Governors, and school/academy leaders assisting them to guide our schools/academies to continually improve towards outstanding status and beyond.
- Full clerking and administrative support for Members, Trustees, and Local Advisory Boards, including panels and hearings in respect of complaints, exclusions and staff matters.
- Delivery and facilitation of training and development opportunities to support our highly appreciated governance volunteers to undertake their roles effectively and fulfil their moral purpose to improve outcomes and life chances for pupils, students and young people.
- Access to National Governance Association (NGA) membership and e-learning offer alongside other professional resources.
- Facilitation of legal support to Members, Trustees, and Governors via external legal partners.
- Advice, guidance, and support with matters including but not limited to:
  - Governor recruitment (including staff/parent elections)
  - Governor attendance and code of conduct matters
  - Maintenance of GIAS records and register of governor business and personal interests
  - Website compliance
  - Complaints handling
  - Admissions, suspensions and exclusions

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**Exceed Academies Trust**  
**Dawnay Road**  
**Bradford**  
**BD5 9LQ**

[info@exceedacademiestrust.co.uk](mailto:info@exceedacademiestrust.co.uk)